

TASFA 2024-2025

TEXAS APPLICATION FOR STATE FINANCIAL AID

THECB
Texas Higher Education
COORDINATING BOARD

The Texas TASFA is a state financial aid application that collects information to help determine eligibility for state (or institutional) financial aid programs. Students who are not currently receiving financial aid from the state of Texas. Students who are currently receiving financial aid using the Free Application for Federal Student Aid (FAFSA) are encouraged to complete the TASFA. For more information, visit [tasfa.org](https://www.tasfa.org) or contact the financial aid office at the institution you plan to attend for the 2024-25 school year. If you meet the FAFSA filing requirements, then you should submit a completed TASFA.

Make sure you fill out the correct TASFA. The year refers to the academic year that you need to receive aid.

DO NOT COMPLETE BOTH THE FAFSA AND TASFA.

The 2024-25 state financial aid priority application deadline for many institutions of higher education is **April 15, 2024**. It is important to complete and submit this application with all required documentation to the financial aid office **on or before April 15** to be considered for the most financial aid possible.

To complete this application, answer each item within each applicable section. If a question does not apply to you, answer N/A for not applicable. For clarification on certain items, refer to the **TASFA Notes on pages 7-12**. If you have further questions about this form, contact the financial aid office at your institution. More information on the TASFA can be found at www.highered.texas.gov/our-work/empowering-our-students.

Note: Personal information collected on the TASFA is protected under the Family Education Rights and Privacy Act (FERPA).

Submit the TASFA and supporting documentation by the state's priority deadline to be considered for the maximum award amount.

SECTION 1: STUDENT INFORMATION

DEMOGRAPHICS

| | | | |
|--|------------------------------|-------------|-----------------|
| 1. Last Name | 2. First Name | | |
| 3. Social Security Number (SSN), Individual Taxpayer Identification Number (ITIN), Deferred Action for Childhood Arrivals (DACA) number? | <input type="checkbox"/> N/A | | |
| 4. Home Address (include apt. number) | | | |
| 5. City | 6. State | 7. ZIP Code | 8. Phone Number |
| 9. Your Email Address | | | |

Use an email address you check regularly and will keep after graduating from high school.

EDUCATION DETAILS

| | | |
|---|---|--|
| 10. What will your high school (HS) completion status be when you begin college in the 2024-25 school year? | <input type="checkbox"/> High School Diploma | <input type="checkbox"/> Homeschooled (Skip to question 14) |
| | <input type="checkbox"/> High School Equivalency Certificate (i.e., GED, HiSET, etc.) (Skip to questions 13c & 13d) | <input type="checkbox"/> None of these (Skip to question 14) |
| 11. High School Name (If applicable) | | |
| 12. High School City (If applicable) | 13. HS State (If applicable) | 14. HS ZIP code (If applicable) |
| 15. Will you have your first bachelor's degree before you begin the 2024-25 school year? <input type="checkbox"/> Yes <input type="checkbox"/> No | | |

SELECTIVE SERVICE STATEMENT OF REGISTRATION STATUS

An individual born male must complete the Selective Service Statement of Registration Status. For more information on Selective Service registration, visit www.selectiveservice.gov.

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| 16. Were you born male or female? <input type="checkbox"/> Male <input type="checkbox"/> Female | |
| 17. Please mark one option below: | |
| <input type="checkbox"/> I was born female and not required to register. | |
| <input type="checkbox"/> I was born male and am under the age of 18, and not currently required to register. | |
| <input type="checkbox"/> I was born male and am REGISTERED with the Selective Service. | |
| <input type="checkbox"/> I was born male and am over age 18. I am not registered with the Selective Service, and I am not exempt. | |
| | <input type="checkbox"/> I was born male and am EXEMPT from registration because: (please briefly explain why you are exempt in the box below.) |
| | |

If you select that you were born male, you must indicate your selective service registration status. You are not required to provide proof of registration.

| STUDENT MARITAL STATUS | |
|---|---|
| 17. What is your marital status as of today? <input type="checkbox"/> Single (never married) <input type="checkbox"/> Separated <input type="checkbox"/> Married (not separated) <input type="checkbox"/> Divorced <input type="checkbox"/> Remarried <input type="checkbox"/> Widowed | 18. Month and year you were married, remarried, separated, divorced, or widowed. Month: _____ Year: _____ <input type="checkbox"/> N/A |
| 19. Spouse's Last Name _____ <input type="checkbox"/> N/A | 20. Spouse's First Name _____ <input type="checkbox"/> N/A |
| 21. What is your spouse's Social Security Number (SSN), Individual Taxpayer Identification Number (ITIN), Deferred Action for Childhood Arrivals (DACA) number? _____ <input type="checkbox"/> N/A | |
| STUDENT EARNINGS AND TAX INFORMATION | |
| The financial aid office may require documentation, such as W-2s, tax returns, or tax transcripts. See Notes for questions 22-29. | |
| 22. How much did you earn from working in 2022? _____ <input type="checkbox"/> N/A | 23. How much did your spouse earn from working in 2022? _____ <input type="checkbox"/> N/A |
| 24. For 2022, have you completed your IRS income tax return or another tax return? <input type="checkbox"/> Already completed <input type="checkbox"/> Will file <input type="checkbox"/> Not going to file (Skip to question 30) | 25. What income tax return did you file or will file for 2022? <input type="checkbox"/> IRS 1040 <input type="checkbox"/> Foreign tax return, IRS 1040NR or IRS 1040NR-EZ <input type="checkbox"/> Tax return from Puerto Rico, a U.S. territory, or Freely Associated State |
| 26. What is or will be your tax filing status for 2022? <input type="checkbox"/> Single <input type="checkbox"/> Head of Household <input type="checkbox"/> Married filing jointly <input type="checkbox"/> Married filing separately <input type="checkbox"/> Qualifying widow(er) | 27. Did (or will) you file a Schedule A, B, D, E, F or H with your 2022 tax return? <input type="checkbox"/> Yes |
| 28. What was your adjusted gross income for 2022? _____ | 29. How much federal income tax was paid for 2022 from 1040—line 22 minus Schedule 2—line 2. If negative, enter zero. _____ |
| DO NOT LEAVE ANY BLANKS. If the answer is zero or the question does not apply to you, enter "0." Report whole dollar yearly amounts with no cents. Enter the combined amounts for you (and your spouse if applicable). See Notes for questions 30-43. | |
| STUDENT ASSETS | |
| 30. As of today, what is your (and spouse's) total current balance of cash, savings, and checking accounts? <i>Don't include student financial aid.</i> | |
| 31. As of today, what is the net worth of your (and spouse's) investments, including real estate? <i>Don't include the home you live in. Net worth is the value of the investments minus any debts owed against them.</i> | |
| 32. As of today, what is the net worth of your (and spouse's) current businesses and/or investment farms? <i>Enter the net worth of the student's businesses or for-profit agricultural operations. Net worth is the value of the businesses or farms minus any debts owed against them.</i> | |
| 33. Child support received for any of your children. Don't include foster care or adoption payments. | |
| STUDENT 2022 ADDITIONAL FINANCIAL INFORMATION AND UNTAXED INCOME | |
| 34. Education credits (American Opportunity Tax Credit and Lifetime Learning Tax Credit) from IRS Form 1040 Schedule 3—line 3. | |
| 35. Taxable college grant and scholarship aid reported to the IRS as income. Includes AmeriCorps benefits (awards, living allowances and interest accrual payments), as well as grant and scholarship portions of fellowships and assistantships. | |
| 36. IRA deductions and payments to self-employed SEP, SIMPLE, Keogh and other qualified plans from IRS Form 1040 Schedule 1—total of lines 16 + 20. | |
| 37. Tax exempt interest income from IRS Form 1040—line 2a. | |
| 38. Untaxed portions of IRA distributions from IRS Form 1040—line 4a minus 4b. | |

Enter an answer for **every** question. Leaving a question blank may result in a delay in processing your TASFA.

| | |
|---|--|
| 39. IRA rollover into another IRA or qualified plan. | |
| 40. Untaxed portions of pensions from IRS Form 1040—line 5a minus 5b. | |
| 41. Pension rollover into an IRA or other qualified plan. | |
| 42. Net profit or loss from IRS Form 1040—line 31 of Schedule C. | |
| 43. Foreign earned income exclusion from IRS Form 1040—line 8d of Schedule 1. | |

SECTION 2: STUDENT STATUS DETERMINATION

Answer all questions. See Notes for questions 44-56.

| | |
|---|--|
| 44. Were you born before January 1, 2001? | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| 45. As of today, are you married? | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| 46. At the beginning of the 2024-2025 school year, will you be working on a master's or doctorate program (such as an MA, MBA, MD, JD, PhD, EdD, graduate certificate, etc.)? | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| 47. Are you currently serving on active duty in the U.S. Armed Forces for purposes other than training? | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| 48. Are you a veteran of the U.S. Armed Forces? | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| 49. Do you have children who will receive more than half of their support from you between July 1, 2024 and June 30, 2025? | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| 50. Do you have dependents (other than your children or spouse) who live with you and who receive more than half of their support from you, now and through June 30, 2025? | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| 51. At any time since you turned age 13, were both your parents deceased, were you in foster care or were you a dependent or ward of the court? | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| 52. As determined by a court in your state of residence, are you or were you an emancipated minor? | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| 53. Does someone other than your parent or stepparent have legal guardianship of you, as determined by a court in your state of legal residence? | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| 54. At any time on or after July 1, 2023, did your high school, school district homeless liaison/designee, or financial aid administrator determine that you were an unaccompanied youth who was homeless? | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| 55. At any time on or after July 1, 2023, did the director or designee of an emergency or transitional shelter, street outreach program, homeless youth drop-in center, or other similar program determine that you were an unaccompanied youth who was homeless? | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| 56. At any time on or after July 1, 2023, did a local housing or community development program determine that you were homeless? | <input type="checkbox"/> Yes <input type="checkbox"/> No |

If you are homeless or at risk of homelessness, answer yes to this question. Talk to your counselor or homeless liaison as soon as possible, and they can get you the documentation needed to verify your living status.

SECTION 3: PARENT INFORMATION

STOP: If you answered "YES" to any of the questions in SECTION 2, parental information is **NOT** required. Proceed to SECTION 4.

If you answered "NO" to all the questions in SECTION 2, you **must include** parental information, even if you do not live with your legal parents (biological, adoptive, or as determined by the state [for example, if the parent is listed on the birth certificate]).

Grandparents, foster parents, legal guardians, widowed stepparents, aunts, uncles, and siblings are **not** considered parents on this form, unless they have legally adopted you. If your legal parents are married to each other, or are not married to each other and **live together**, answer the questions about both of them.

If you are in a single-parent home (e.g., parent(s) was never married, divorced, separated, etc.), review the TASFA Notes for clarification.

57. As of today, what is the marital status of your legal parents?

- ☐ Single (never married) ☐ Separated
☐ Married (not separated) ☐ Divorced
☐ Remarried ☐ Widowed
☐ Unmarried and both legal parents living together

58. Month and year your parents were married, remarried, separated, divorced, or widowed:

Month: _____ Year: _____ ☐ N/A (Never Married)

PARENT 1

| | | | |
|--|--|---|------------------------------|
| 59. Last Name | | 60. First Name | |
| 61. Date of Birth | | 62. What is your Parent 1's Social Security Number (SSN), Individual Taxpayer Identification Number (ITIN), Deferred Action for Childhood Arrivals (DACA) number? | <input type="checkbox"/> N/A |
| 63. Phone Number | | 64. Email Address | |
| 65. Highest level of education completed: <input type="checkbox"/> Middle School/Jr. High <input type="checkbox"/> High School <input type="checkbox"/> College or Beyond <input type="checkbox"/> Other/Unknown | | | |

PARENT 2 (IF APPLICABLE)

| | | | |
|--|--|---|------------------------------|
| 66. Last Name | | 67. First Name | |
| 68. Date of Birth | | 69. What is your Parent 2's Social Security Number (SSN), Individual Taxpayer Identification Number (ITIN), Deferred Action for Childhood Arrivals (DACA) number? | <input type="checkbox"/> N/A |
| 70. Phone Number | | 71. Email Address | |
| 72. Highest level of education completed: <input type="checkbox"/> Middle School/Jr. High <input type="checkbox"/> High School <input type="checkbox"/> College or Beyond <input type="checkbox"/> Other/Unknown | | | |

Answer this question carefully. Institutions may have scholarships for students who are the first in their family to attend college.

PARENT EARNINGS AND TAX INFORMATION

The financial aid office may require documentation, such as W-2s, tax returns, or tax transcripts. See Notes for questions 73-80.

| | |
|--|--|
| 73. How much did Parent 1 earn from working in 2022? _____ | 74. How much did Parent 2 earn from working in 2022? _____ (If applicable) |
| 75. For 2022, have your parents completed an IRS income or another tax return? <input type="checkbox"/> Already completed <input type="checkbox"/> Will file <input type="checkbox"/> Not going to file (skip to question 81) | 76. What income tax return did your parents file or will file for 2022? <input type="checkbox"/> IRS 1040 <input type="checkbox"/> Foreign tax return, IRS 1040NR or IRS 1040NR-EZ <input type="checkbox"/> Tax return from Puerto Rico, a U.S. territory, or |
| 77. What is or will be your parents' tax filing status for 2022? <input type="checkbox"/> Single <input type="checkbox"/> Head of household <input type="checkbox"/> Married filing jointly <input type="checkbox"/> Married filing separately <input type="checkbox"/> Qualifying surviving spouse | 78. Enter your parents' 2022 adjusted gross income from IRS Form 1040—line 11. _____ |
| 79. Enter your parents' 2022 adjusted gross income from IRS Form 1040—line 11. _____ | 80. Enter your parents' 2022 income tax paid from 1040—line 22 minus Schedule 2—line 2. If negative, enter a zero. _____ |

Most institutions will require that you submit verification of income, which may include copies of tax return transcripts, W-2s, or other documentation.

DO NOT LEAVE ANY BLANKS.

If the answer is zero or the question does not apply to you, enter "0." Report whole dollar yearly amounts with no cents. Enter the combined amounts for your parents (if applicable). See Notes for questions 81-94.

PARENT ASSETS

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|--|--|
| 81. As of today, what is your parents' total current balance of cash, savings, and checking accounts? <i>Don't include student financial aid.</i> | |
| 82. As of today, what is the net worth of your parents' investments, including real estate? <i>Don't include the home in which your parents live. Net worth is the value of the investments minus any debts owed against them.</i> | |
| 83. As of today, what is the net worth of your parents' current businesses and/or investment farms? <i>Enter the net worth of the parents' businesses or for-profit agricultural operations. Net worth is the value of the businesses or farms minus any debts owed against them.</i> | |
| 84. Child support received for any of your parents' children. Don't include foster care or adoption payments. | |

PARENT 2022 ADDITIONAL FINANCIAL INFORMATION AND UNTAXED INCOME (ENTER THE COMBINED AMOUNTS FOR YOUR PARENTS)

| | |
|---|--|
| 85. Education credits (American Opportunity Tax Credit and Lifetime Learning Tax Credit) from IRS Form 1040 Schedule 3—line 3. | |
| 86. Your parents' taxable college grant and scholarship aid reported to the IRS as income . Includes AmeriCorps benefits (awards, living allowances and interest accrual payments), as well as grant and scholarship portions of fellowships and assistantships. | |
| 87. IRA deductions and payments to self-employed SEP, SIMPLE, Keogh and other qualified plans from IRS Form 1040 Schedule 1—total of lines 16 + 20. | |
| 88. Tax exempt interest income from IRS Form 1040—line 2a. | |
| 89. Untaxed portions of IRA distributions from IRS Form 1040—line 4a minus 4b. | |
| 90. IRA rollover into another IRA or qualified plan. | |
| 91. Untaxed portions of pensions from IRS Form 1040—line 5a minus 5b. | |
| 92. Pension rollover into an IRA or other qualified plan. | |
| 93. Net profit or loss from IRS Form 1040—line 31 of Schedule C. | |
| 94. Foreign earned income exclusion from IRS Form 1040—line 8d of Schedule E. | |

In this section, indicate if anyone in your household receives benefits from any of these federal programs.

SECTION 4: FAMILY INFORMATION**FEDERAL BENEFITS RECEIVED**

This information being collected below will be used to help determine eligibility for certain state financial aid options. Information disclosed about federal benefits received is protected from unauthorized distribution to third parties under the Family Educational Rights and Privacy Act (FERPA) of 1974.

At any time during 2022 or 2023, did you or anyone **in your family** (including your spouse or parents, if applicable) receive benefits from any of the federal programs listed? Mark all that apply with Yes, No or Prefer not to answer.

| | |
|---|--|
| 95. Medicaid, including the Children's Health Insurance Program (CHIP), Supplemental Security Income (SSI), or refundable credit for coverage under a qualified health plan (QHP) | <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Prefer not to answer |
| 96. Supplemental Nutrition Assistance Program (SNAP) benefits, also known as food stamps | <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Prefer not to answer |
| 97. Free and Reduced-Price School Lunch Program | <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Prefer not to answer |
| 98. Temporary Assistance for Needy Families (TANF) – may use a different name in different states | <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Prefer not to answer |
| 99. Special Supplemental Nutrition Program for Women, Infants, and Children (WIC) | <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Prefer not to answer |
| 100. Earned Income Credit (EIC) | <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Prefer not to answer |
| 101. Federal Housing Assistance | <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Prefer not to answer |

FAMILY SIZE

If you answer **"NO"** to all questions in **SECTION 2 (44-56)**, use these instructions to calculate your totals for questions 102 and 103.

- **Total number in family:** Include your parent (and spouse), yourself, your parent's dependent children (even if they live apart from you), and other people living with your parent now. Include these dependent children and other people only if you will provide more than half of their support between July 1, 2024, and June 30, 2025.
- **Total number in college for 2024-25:** Always count yourself as a college student. **Do not include your**

If you answer **"YES"** to any question in **SECTION 2 (44-56)**, use these instructions to calculate your totals for questions 102 and 103.

- **Total number in family:** Include yourself (and spouse), your dependent children (even if they live apart from you), and other people living with you now. Include these dependent children and other people only if you will provide more than half of their support between July 1, 2024, and June 30, 2025.
- **Total number in college for 2024-25:** Always count yourself as a college student.

102. How many people are in your family? (response required) _____

103. How many people are in college for 2024-25? (response required) _____ between July 1, 2024 and June 30, 2025? (see instructions above) _____

SECTION 5: COLLEGE

COLLEGE

If you plan to attend college, answer the questions below for each copy you submit. Your housing status is based on your living situation at the time you submit the application. Your college student ID, if you were provided one, is an optional item that will be used to match your application with your official student record if you enroll at a college.

104. What college do you plan to attend for 2024-25? (response optional) _____

105. Where do you plan to live when you attend college? (response required) ☐ On-campus ☐ Off-campus ☐ With parents or relative

106. What is your college student ID#, if you were provided one? (response optional) _____

SECTION 6: SIGNATURE

I confirm that the information provided on this TASFA is true and correct to the best of my knowledge. I understand that my submission to pay only the cost of attending a Texas institution of higher education may void my eligibility for state (or institutional) financial aid. By signing this application, I also acknowledge and confirm that:

- I understand that the information provided on this application will be used to determine my eligibility for state (or institutional) financial aid and that I may need to provide additional information or documentation to the college or university.
- Once my application has been submitted, I must contact the college or university directly to discuss next steps to update or correct information on my submitted TASFA.

Student Signature _____ Date _____

Parent Signature _____ Date _____

One parent signature is required if all questions in **SECTION 2** (question 44-56) were answered **"NO"**.

Mark which parent signed above. ☐ Parent 1 ☐ Parent 2

Submitting the TASFA: Your completed application should be sent directly to the institution's financial aid office for additional instructions (see notes page 5).

Follow instructions to calculate the family size. Count yourself when determining the number of people that will be college. This number should not be 0.

Submit a copy of the Paper TASFA and all required supporting documents to each college or university you are considering attending.

Entering a student ID will help the institution to match the TASFA to the your campus files.

If you are a dependent student, at least one parent must sign the TASFA, even if they live in another city, state, or country. Another family member may not sign in their place. Be sure to give yourself enough time to get the signature if you must email or mail the form to your parent.